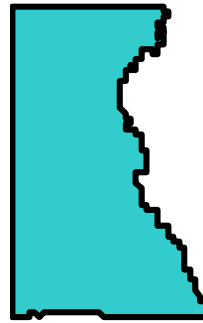
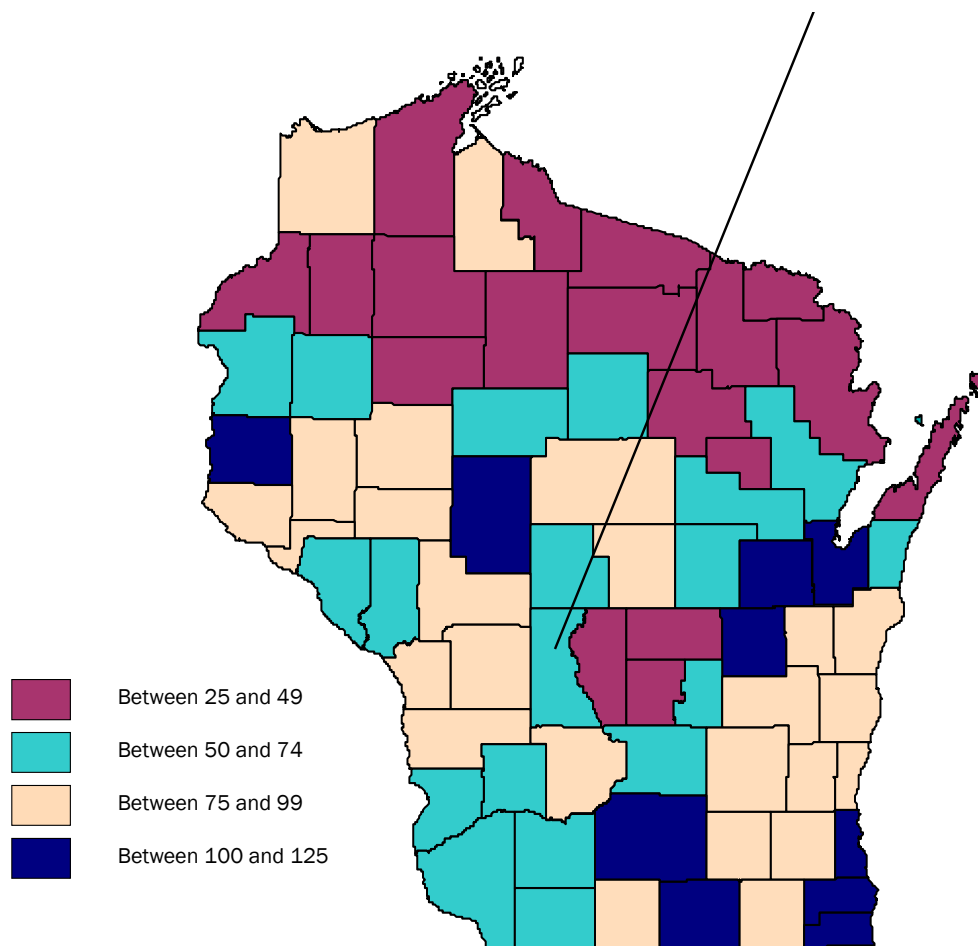


Juneau County Workforce Profile



The number of residents aged 25-29 years for every
100 residents aged 60-64 years in year 2025



Source: Wisconsin Department of Administration, Demographic Services Center and the U.S. Bureau of Census.

For comparison, it is projected that there will be 90 residents aged 25-29 for every 100 residents aged 60-64 in Wisconsin in 2025. Nationally, it is projected that there will be 101 residents aged 25-29 for every 100 residents aged 60-64. In 2003, Wisconsin had 146 residents aged 25-29 for every 100 aged 60-64.



County Population

The population in Juneau County increased 4.7 percent from April 2000 through December 31, 2003. Juneau's 4.7 percent growth rate was the seventh fastest growth rate among Wisconsin's 72 counties during this period. These additional 1,154 residents came almost entirely from individuals moving into the county, as there were only 57 more births in the county than the number of deaths over this period.

Total Population

	April 2000 Census	Jan. 1, 2004 estimate	Numeric change	Percent change
United States	281,421,906	292,287,454	10,865,548	3.9%
Wisconsin	5,363,715	5,532,955	169,240	3.2%
Juneau County	24,316	25,470	1,154	4.7%
Largest Municipalities				
Mauston, City	3,740	4,133	393	10.5%
Necedah, Town	2,156	2,349	193	9.0%
Lemonweir, Town	1,763	1,802	39	2.2%
Elroy, City	1,578	1,558	-20	-1.3%
New Lisbon, City	1,436	1,429	-7	-0.5%
Lyndon, Town	1,217	1,328	111	9.1%
Germantown, Town	1,174	1,317	143	12.2%
Lisbon, Town	1,020	1,038	18	1.8%
Necedah, Village	888	896	8	0.9%
Wonewoc, Village	834	826	-8	-1.0%

Source: Wis. Dept. of Administration, Demographic Services and U. S. Census Bureau

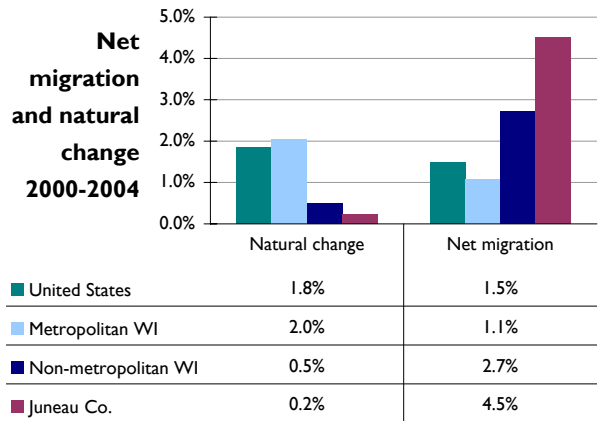
This increase in Juneau County's population is quite robust. During the same time period the national population grew by 3.9 percent and the statewide population grew by 3.2 percent. The net migration rate in Juneau County was triple the migration rates of Wisconsin and the United States.

Juneau County is experiencing an aging residential population. In 1980, the median age of a Juneau County residents was 31.5 years, in 1990 it was 34.5, and by the year 2000 the median age of a Juneau County resident had climbed to 39.4 years old. In 2000, Juneau County was the 19th eldest county of Wisconsin's 72 counties in terms of median age. In addition, many pieces of anecdotal and inferential evidence indicate that much of the in-migration into Juneau County are retired individuals. On page 3 the reader will notice that Juneau County residents participation (LFPR, see glossary) in the workforce is almost 20 percentage points lower than the statewide average, further evidence that a sizable chunk

of Juneau's in-migration is of retired individuals.

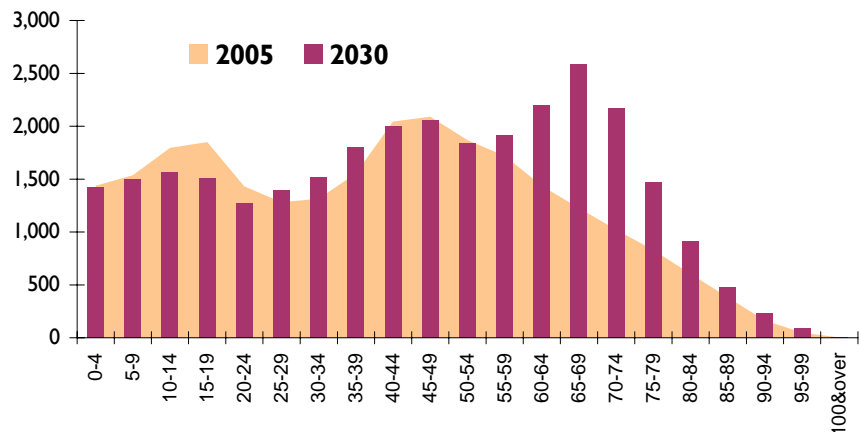
From a broad age-group perspective, the number of residents ages 19 years and younger will decrease by about nine percent over this 25-year period. The number of those in their "prime working years", ages 20 to 59 years, will increase by a modest four percent. And Juneau's residents ages 60 years and older are projected to increase an almost unfathomable 77 percent. From a compositional point of view, those 19 and younger are projected to decrease from 24 percent of the total population to about 19 percent. The 20 to 59 year-olds will decrease from 48 percent to 43 percent of the total population. The number of those 60 years and older will increase from 22 percent to 31 percent of the total.

The impact of an aging population is perhaps more obvious in terms of services that they will require, but it will also impact the availability of labor. Assuming that 65 years represents an average age of retirement and that 18



Source: WI Dept. of Admin., Demographic Services and U. S. Census Bureau

Population by Age Groups in Juneau County



Source: WI Dept. of Administration, Demographic Services

Future Population and Labor Supply

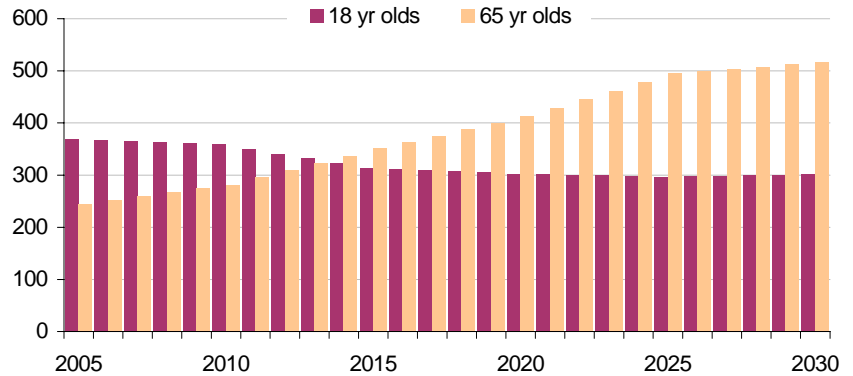
years represents high school graduation then a plot of the number of these residents points to a time when the first group exceeds the second group in number. This convergence will occur in 2014 in Juneau County.

These demographic forecasts present a number of issues to address. One is that the number of those leaving the workforce will exceed those entering. One should keep in mind that Juneau County has already experienced labor shortages in the late 1990s even with Juneau's high unemployment rates. The coming years will experience labor shortages that may be more pronounced particularly in occupations that tend to be filled by those of a certain age group, or gender, or educational background. The reader should note that Juneau County has the lowest average educational attainment out of Wisconsin's 72 counties, further exacerbating the potential for employer-demand/job-seeker mismatches.

Another issue is that as the population ages; the economy changes. As residents age they place more demand on the community's providers of goods and services, i.e., health services, retail trade, leisure and hospitality, etc. Employers will compete for workers as they always have, but some skilled and educated workers will be in shorter supply relative to increased demand fueled by this demographically changing population. The labor force will be older on average though it is uncertain whether workers will remain in the labor force longer than they are currently. The term 'retirement' is subjective as many retirees rejoin the workforce, though usually in a reduced capacity. But the older workforce is a small portion of the total as the labor force participation rate of those 65 and older is low compared to younger age groups.

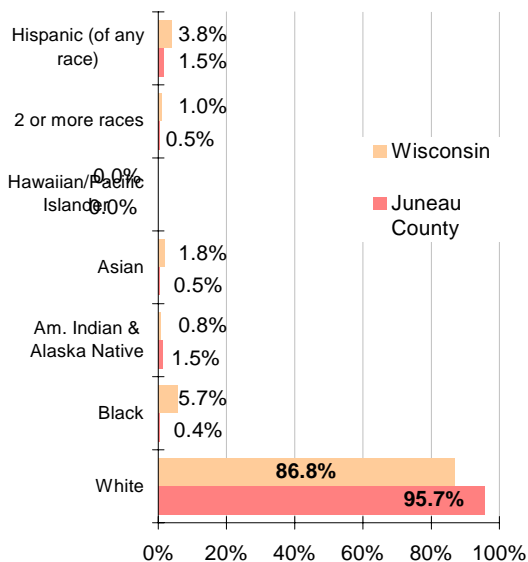
The labor force projection, below, uses national assumptions that include a slight increase in the participation rates of older residents, but it did not factor in the declining participation rates of white residents, and the population in Juneau County is 96 percent white.

Convergence of 18 & 65 year old population in Juneau County



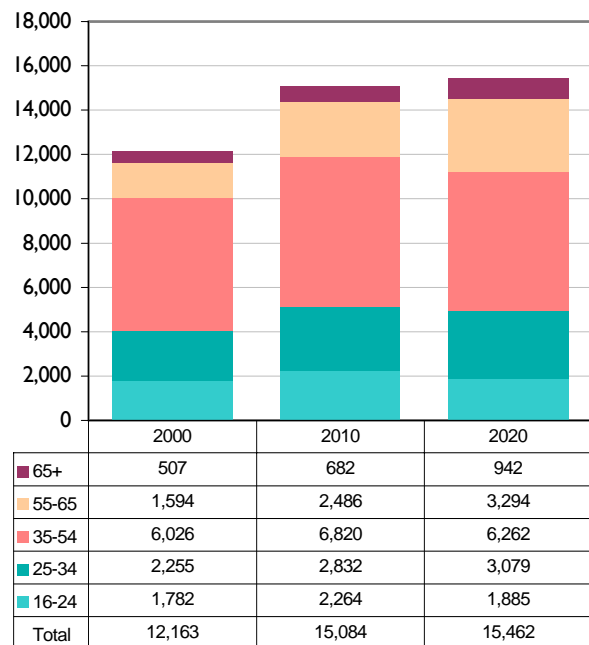
Source: WI Dept. of Administration, Demographic Services

Race and ethnic distribution



Source: U.S. Census Population Characteristics Estimates, 2002

Juneau County Labor Force Projections by Age



Decade change	0.7%	24.1%	2.9%
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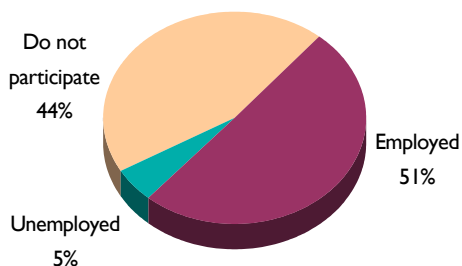
Source: DWD, Office of Economic Advisors, August 2004

Current Labor Force

Labor force participation represents the share of population that is 16 years and older that is either employed or unemployed. Participation rates in Wisconsin and the United States in 2003 were 72.9 and 66.3 percent, respectively. Juneau County's participation rate was substantially lower than the state's or nation's, at 56 percent.

Juneau County's participation rate of 56 percent implies that about 44 percent of the population 16 years and older does

Labor force participation in Juneau County



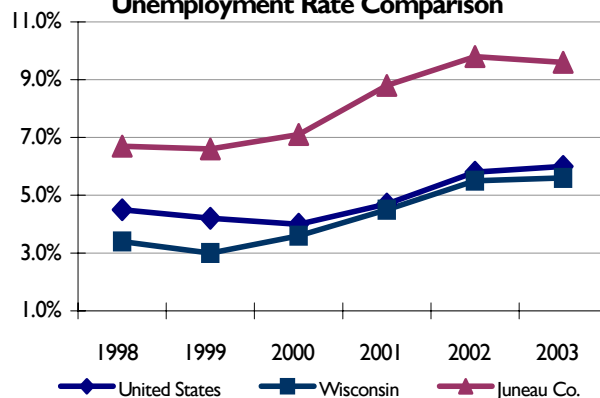
Source: DWD, Office of Economic Advisors, July 2004

not participate in the work force. Only two counties in Wisconsin, Florence and Adams, have lower rates of participation in the workforce than Juneau.

Despite the current high unemployment rates in Juneau County, at some point during the future economic recovery, labor shortages will begin to become a problem for employers in

Juneau County. This labor shortage will have two principle causes in Juneau County; the age and demographic shift in the county, and the mismatch of skills needed for workers to participate in the economy of the future vs. the skills possessed by the unemployed in Juneau County.

Unemployment Rate Comparison



Juneau County Civilian Labor Force Data

	1998	1999	2000	2001	2002	2003
Labor Force	10,922	10,400	10,542	10,864	10,684	10,724
Employed	10,194	9,712	9,796	9,906	9,633	9,698
Unemployed	728	688	746	958	1,051	1,026
Unemployment Rate	6.7%	6.6%	7.1%	8.8%	9.8%	9.6%

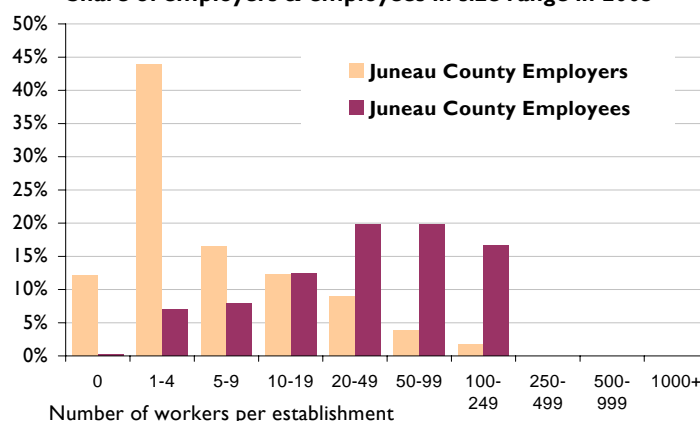
Source: WI DWD, Bur. of Workforce Information, Local Area Unemployment Statistics, 2003

Employers by Size

The majority of Juneau County's employers are small, however, the term "small employer" is subjective. Some define it as an employer with less than 500 employees and some define it as low as 20 employees or fewer. Data regarding Juneau employers with 500-999 employees has been withheld from this graph, but the next page lists an employer in this size range. The county has no employers with 1,000 or more employees.

From the employee perspective, the largest reported share of the county's employees work in establishments that employ 50-99 workers. Almost twenty percent (19.9) of people working in Juneau County work for an employer with 50-99 workers, and 19.8 percent of people employed in Juneau County work for employers with 20-49 employees.

Share of employers & employees in size range in 2003



Source: DWD, Bureau of Workforce Information, Table 221, July 2004

Industry & employers by size

Examination of a county's labor market from the demand (employer) side of view is essential to gauge the type of workforce employers are seeking. The tables below outline the top employers by industry and the top employers by name and establishment size. The pie-graphs to the bottom indicate the prominence of these top industries and employers in terms of the county's total employment.

It is common for services-providing industries to be the sectors showing the largest and fastest employment growth in

both one- and five-year periods. Some goods-producing sectors, manufacturing industries, still show a large presence in terms of total employment, but they may show a loss of employment over these timeframes as well. It is also common that many counties traditionally heavy in goods-producing employment now have services-providers, particularly those in health and education services, as their larger employers and industry sectors.

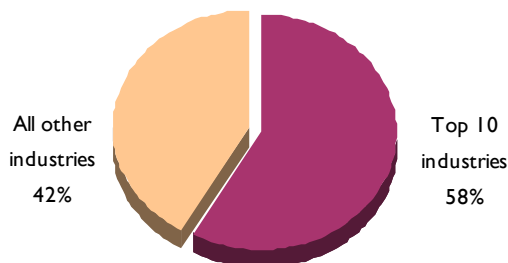
Top 10 Industries in Juneau County

Industry	March 2004		Numeric Employment Change	
	Establishments	Employees	2003-2004	1999-2004
Hospitals	suppressed	suppressed	not avail.	not avail.
Fabricated metal product manufacturing	10	920	-29	-288
Educational services	8	773	-24	-26
Food services & drinking places	44	530	26	19
Gasoline stations	17	368	38	-15
Executive, legislative, & gen government	28	339	23	60
National security & international affair	suppressed	suppressed	not avail.	not avail.
Ambulatory health care services	17	276	20	31
Electrical equipment & appliances	3	258	16	-505
Nursing & residential care facilities	8	240	-19	-8

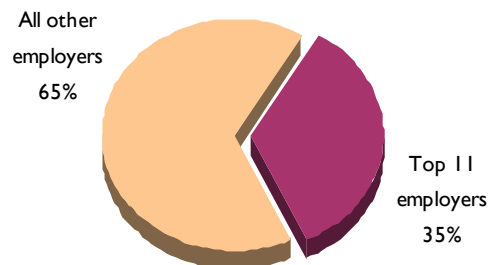
Top 10 Employers in Juneau County

Establishment	Product or Service	Size (Dec. 2003)
Hess Memorial Hospital Inc.	General medical and surgical hospitals	500-999 employees
Walker Stainless Equipment Co. Inc.	Plate work manufacturing	250-499 employees
WI H&FS Sandridge Treatment Facility	Psychiatric and substance abuse hospitals	250-499 employees
School District of Mauston	Elementary and secondary schools	250-499 employees
County of Juneau	Executive and legislative offices, combined	250-499 employees
Volk Field	National security	100-249 employees
Parker Hannifin Corp.	Fluid power valve and hose fitting mfg.	100-249 employees
Freudenberg - FNGP Mfg.	Gasket, packing, and sealing device mfg.	100-249 employees
Necedah Public School	Elementary and secondary schools	100-249 employees
Brunner Drilling & Mfg. Co. Inc.	Bolt, nut, screw, rivet, and washer mfg.	100-249 employees
Pic N Save	Supermarkets and other grocery stores	100-249 employees

Share of jobs in top 10 industries in Juneau County



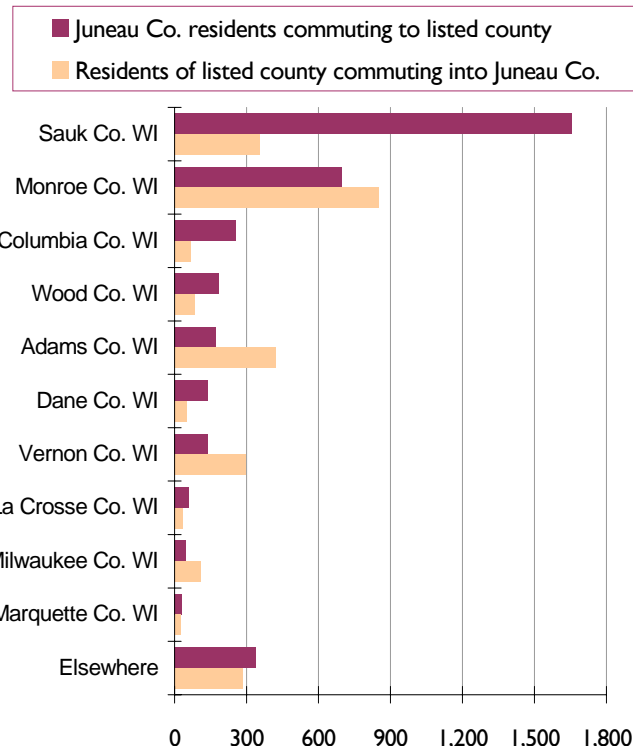
Share of Juneau County jobs with top 10 employers



Commuting

Juneau County workers are very mobile and many work in places other than their county of residence. The number of Juneau County residents commuting out of county increased dramatically between 1990 and 2000. The number of workers lost daily to Sauk County has increased from 480 in the 1990 Census to 1,302 reported in Census 2000, a 170 percent increase.

Several reasons exist for workers leaving Juneau for Sauk such as the wages paid in Sauk County are generally higher than in Juneau and more management/professional positions exist in Sauk County than in Juneau County. Juneau County's strong manufacturing industry sector has taken a substantial hit over the last three years, so some Juneau County workers seeking manufacturing employment now leave the county to find similar work. Last, but not least, both Sauk and Juneau have a very strong tourism/hospitality industry mix, but Sauk County's tourism industry generally pays higher wages than Juneau's. Average wages for hospitality industry employees are only 79 percent of the statewide average in Juneau County, but average wages for hospitality industry employees in Sauk County are 113 percent of the statewide average.



Source: U.S. Census 2000, Special tabulations: Worker Flow Files

Key occupations & wages

The table to the right lists the occupations with the most employment in the Adams Labor Supply Area (includes Juneau County) as of May 2003. Their hourly wages are also displayed.

The hourly wages shown include the mean (average) and the median (50th percentile), which are the most frequently requested occupational data. The 25th and 75th percentile wages are also included to help give an indication of entry-level and experienced worker wages, respectively. The 25th percentile indicates that 75 percent of the total workers in this occupation earn more per hour than this wage. The 75th percentile wage indicates that 25 percent of workers make more than this hourly wage.

If the mean and median wages are relatively close, the labor market for this worker is probably tight or very competitive for hiring employers. If the median is significantly below the mean, an employer offering mean wages should have an advantage in attracting workers. However, prospective workers will likely find a higher than average level of competition for these jobs.

Occupation title	Hourly Wages			
	Mean	Percentile		
		25 th	50 th	75 th
Cashiers	\$7.59	\$6.46	\$7.44	\$8.52
Team assemblers	\$11.08	\$9.05	\$11.49	\$13.23
Truck drivers, heavy & tractor-trailer	\$20.47	\$16.17	\$21.25	\$25.54
Nursing aides, orderlies, & attendants	\$10.62	\$9.20	\$10.22	\$11.74
Janitors & cleaners, except maids & hskpg. cleaners	\$9.47	\$7.49	\$9.52	\$11.02
Waiters & waitresses	\$6.61	\$5.85	\$6.33	\$6.81
Laborers & freight, stock, & material movers, hand	\$9.30	\$7.06	\$9.42	\$10.90
Comb. food prep. & serving workers (fast food)	\$7.83	\$6.04	\$6.87	\$8.77
Retail salespersons	\$9.02	\$7.38	\$8.44	\$9.96
Office clerks, general	\$11.22	\$9.44	\$10.95	\$13.05
Registered nurses	\$22.72	\$19.68	\$22.32	\$25.65
Secretaries, except legal, medical, & executive	\$10.78	\$9.05	\$10.76	\$12.62
Packaging & filling machine operators & tenders	\$11.71	\$9.54	\$10.76	\$14.85
Bookkeeping, accounting, & auditing clerks	\$11.65	\$9.83	\$11.00	\$13.17
Industrial truck & tractor operators	\$12.90	\$10.93	\$12.56	\$14.18
General & operations managers	\$39.89	\$23.61	\$29.87	\$44.94
Elem. school teachers, except special ed.	-	-	-	-
1st-line supvsr/mgrs. of prod. & operating workers	\$21.67	\$13.95	\$18.34	\$24.11
1st-line supvsr/mgrs. of office & admin. support	\$18.13	\$13.50	\$16.71	\$21.20
Teacher assistants	-	-	-	-

Juneau County is part of an area which includes Adams, Jackson, Juneau, and Monroe counties.

Employment and Wages

The bottom graph emphasizes that despite recent difficulties in manufacturing industries, it is still a significant part of Juneau County's economy. As of 2003, manufacturing comprises roughly 25 percent of all jobs and 33 percent of the total payroll in Juneau County.

The average wage for all workers in Juneau County, \$26,982, increased 3.7 percent from the 2002 average of \$26,008. The statewide average wage rose 3.1 percent in 2003 to \$33,423.

While Juneau's annual increase exceeded the statewide rate the wages paid in Juneau in 2003 were still about 81 percent of the statewide average.

Juneau County's annual average wages are higher than the statewide average in just two industry sectors, natural resources and 'other' services. Neither of these two sectors have a substantial employment presence in Juneau County.

The annual wages that an industry pays can depend upon many factors such as its geographic location, seasonal activity, presence of workers under collective bargaining agreements, etc. But the most crucial overall wage component is an industry's occupational composition. Some industries employ

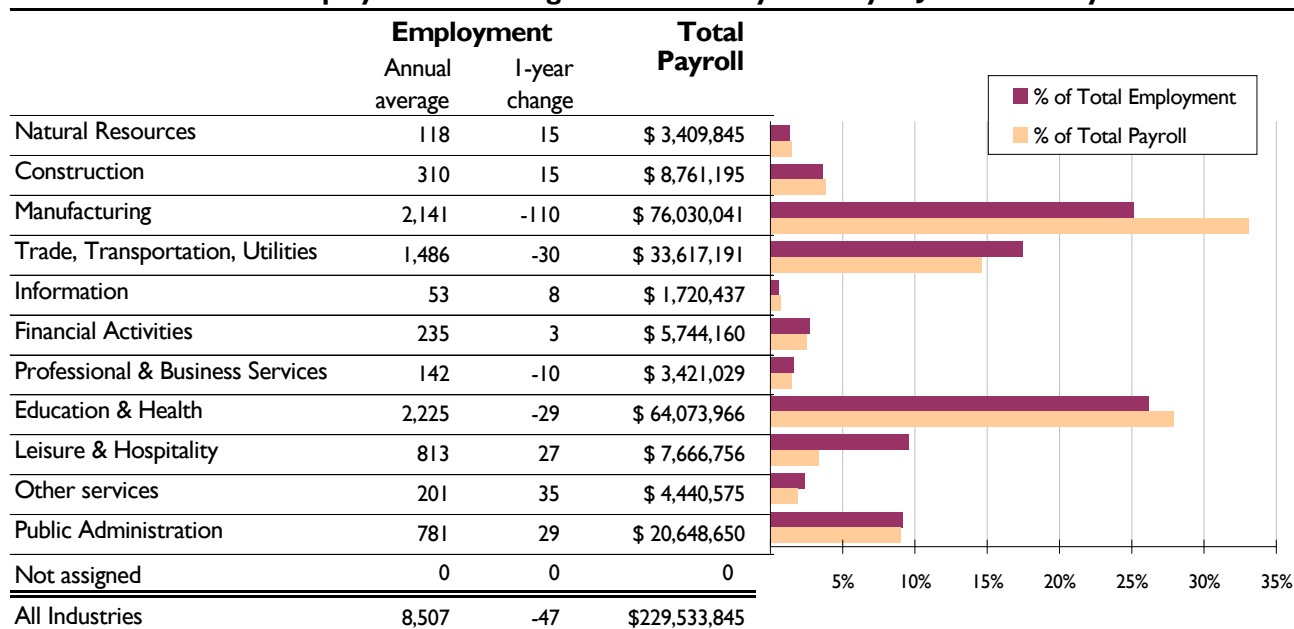
Average Annual Wage by Industry Division in 2003

	Average Annual Wage Wisconsin	Average Annual Wage Juneau County	Percent of Wisconsin	1-year % change
All Industries	\$ 33,423	\$ 26,982	80.7%	3.7%
Natural resources	\$ 25,723	\$ 28,897	112.3%	10.4%
Construction	\$ 40,228	\$ 28,262	70.3%	1.1%
Manufacturing	\$ 42,013	\$ 35,511	84.5%	6.5%
Trade, Transportation, Utilities	\$ 28,896	\$ 22,623	78.3%	0.0%
Information	\$ 39,175	\$ 32,461	82.9%	17.2%
Financial activities	\$ 42,946	\$ 24,443	56.9%	3.4%
Professional & Business Services	\$ 38,076	\$ 24,092	63.3%	10.8%
Education & Health	\$ 35,045	\$ 28,797	82.2%	3.4%
Leisure & Hospitality	\$ 12,002	\$ 9,430	78.6%	6.8%
Other services	\$ 19,710	\$ 22,092	112.1%	14.8%
Public Administration	\$ 35,689	\$ 26,439	74.1%	3.8%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

higher than average shares of skilled/educated workers typically commanding salaries that are on the higher end of the scale. Some industries employ proportionately more entry-level, part-time or seasonal workers. Leisure and hospitality employment represents approximately 10 percent of Juneau County's employment, yet it pays a disproportionately low three percent of the county's total annual wages; evidence of its seasonal and part-time occupational employment characteristics.

2003 Employment and Wage Distribution by Industry in Juneau County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2004

Per Capita Personal Income

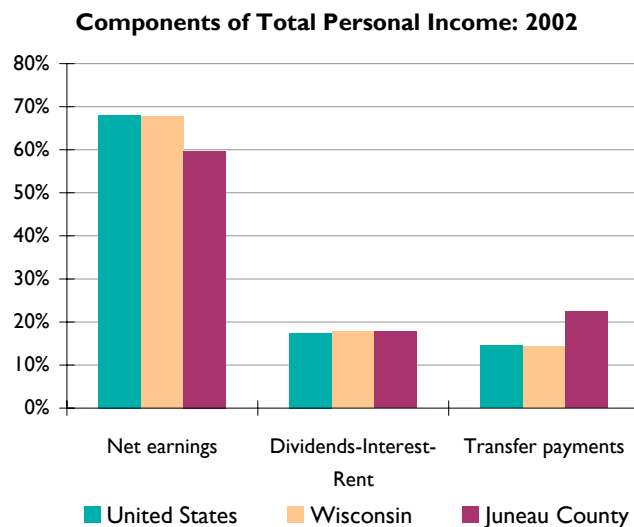
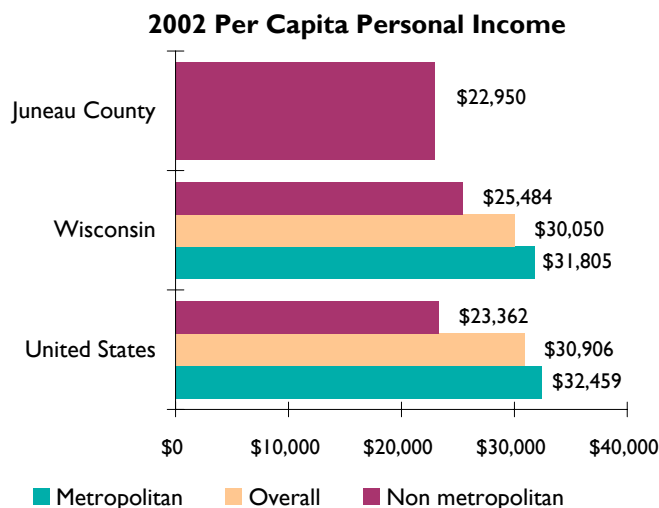
Per capita personal income (PCPI) is total income divided by the total number of residents (also see glossary). Per capita income can influence the type of services and housing available within a county.

Juneau County's PCPI in 2002 of \$22,950 ranked 58th of Wisconsin's 72 counties. Juneau's 2002 PCPI is lower than the state and national PCPI; it is also lower than the average PCPI of all non-metropolitan counties in Wisconsin. Juneau County's PCPI growth rate has been slower over the last five years, increasing 21 percent, lagging both the state and national growth rates.

Per capita income can be influenced by a county's number of wage earners, average family size, the types of occupations available, average age of the residents, and the county's labor force participation rate. The composition of the county's income - how it is earned or acquired - can dictate how dynamic it is and how it changes over time. A high portion of Juneau County's total income comes via transfer payments, which tend to be static in their amount. The manufacturing employment downturn was instrumental slowing down income growth in Juneau.

	Per Capita Personal Income						Percent Change	
	1997	1998	1999	2000	2001	2002	1 year	5 year
United States	\$25,334	\$26,883	\$27,939	\$29,847	\$30,527	\$30,906	1.2%	22.0%
Wisconsin	\$24,514	\$26,175	\$27,135	\$28,573	\$29,361	\$30,050	2.3%	22.6%
Non-metropolitan WI	\$20,734	\$22,195	\$22,900	\$24,059	\$24,833	\$25,484	2.6%	22.9%
Juneau County	\$18,974	\$19,859	\$20,262	\$21,339	\$22,223	\$22,950	3.3%	21.0%
In current dollars (adjusted to U.S. CPI-U)								
United States	\$28,397	\$29,670	\$30,170	\$31,181	\$31,010	\$30,906	-0.3%	8.8%
Wisconsin	\$27,478	\$28,889	\$29,301	\$29,850	\$29,825	\$30,050	0.8%	9.4%
Non-metropolitan WI	\$23,240	\$24,497	\$24,728	\$25,135	\$25,226	\$25,484	1.0%	9.7%
Juneau County	\$21,268	\$21,917	\$21,879	\$22,293	\$22,575	\$22,950	1.7%	7.9%

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, May 2004



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2004

The county workforce profiles are produced annually by the Office of Economic Advisors in the Wisconsin Department of Workforce Development. The author of this profile and regional contact for additional labor market information is:

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Metropolitan Statistical Area (MSA) - A single county or group of counties that include at least one urbanized area with a minimum population of 50,000. Multiple-county MSAs have a central county or counties, which have a high degree of social and economic integration with the other member counties as measured by commuting data.

Non-metropolitan county - Any county that is not a member of a metropolitan statistical area.

Net Migration - One of two components of population change. It is the net result of individuals who either moved into or out of an area.

Natural Change - One of two components of population change. It is the result of the number of births minus the number of deaths in an area over a period of time. A natural increase indicates there were more births than deaths. A natural decrease indicates there were more deaths than births.

Employed - Persons 16 years of age or older, who worked as paid employees, or worked in their own business, profession or farm, or worked 15 hours or more as unpaid workers in a family-operated enterprise. Includes those temporarily absent from their jobs due to illness, bad weather, vacation, childcare problems, labor dispute, maternity or paternity leave, or other family or personal obligations.

Unemployed - Persons 16 years of age or older with no employment, who were available for work and made efforts to find employment sometime during the previous 4-week period ending with the monthly reference week. Persons who were awaiting recall to a job did not need to look for work to be classified as unemployed.

Labor Force - The sum of the employed and unemployed, whom are at least 16 years of age and older.

Unemployment Rate - The number of unemployed divided by the labor force. It is expressed as a percentage of the labor force.

Labor Force Participation Rate (LFPR) - The labor force divided by the total population aged 16 years and older. It is expressed as a percentage of the population aged 16 years and older.

Suppressed - Data is withheld or suppressed if it does not meet certain criteria. If an industry in a county has fewer than three employers or if a single employer employs 80% or more that industry's total employment in that county then the data are suppressed. These criteria were established to maintain the confidential reporting of payroll and employment by employers.

Total Personal Income - The aggregate income of an area received by all persons from all sources. It is calculated as the sum of wage and salary disbursements (less contributions for government social insurance), supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts that include retirement and veteran's benefits, government paid medical reimbursements, and income maintenance program payments.

Per Capita Personal Income (PCPI) - Total personal income divided by the total population.

Current Dollars - Phrase used to express historical dollar values in terms of their current purchasing power via inflation adjustment.

CPI-U - Consumer Price Index for all urban consumers, the most commonly used measure of inflation in the United States.